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REPORTS ON FOREIGN MARKETS FOR AGRICULTURAL PRODUCTS

UNITED STATES DEPARTMENT OF AGRICULTURE
BUREAU OF MARKETS
FOREIGN MARKETING INVESTIGATIONS

WASHINGTON, D. C., MARCH 27, 1919

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FOREWORD

"Reports on Foreign Markets for Agricultural Products" will be issued weekly by the Bureau of Markets as a means of transmitting promptly to specially interested persons, firms, and associations foreign market information of current value relative to agricultural products. The prime object will be to assist producers and exporters in developing old markets and establishing new ones by furnishing them with timely information as to conditions, methods, and opportunities.

In view of the extensive changes in methods of distribution required during the war to meet the acute needs for food and raw materials under difficult shipping conditions, the trade in agricultural products now must undergo readjustment in its return to private channels. In some respects American exporters and foreign importers must start afresh, and as they resume business they will encounter many strange conditions.

The Bureau's Division of Foreign Marketing Investigations is called upon to answer numerous inquiries for information, and as a means of anticipating the general demand and promoting the interests of American agriculture in the readjustment of world trade, it is believed that the inauguration of the weekly Reports is especially opportune and serves a useful purpose. The work of assembling data on foreign market subjects has been in progress for some time.

The Division of Foreign Marketing Investigations was created in 1916 as a medium through which to extend the Bureau's investigations into

foreign countries. Being designed to assist normal trading and the development of markets thereunder, its work during the period of government control was devoted largely to preparation for the readjustment. In the meantime, however, several investigations of importance were made. An extensive survey of the fruit markets of the Far East and Australasia were carried on; and certain phases of the livestock, meat, dairy, and wool industries of Australasia were studied.

With the signing of the armistice the Bureau got under way its plans for more extended work in foreign countries and will send to Europe in the near future several agricultural trade commissioners as permanent representatives to report on conditions and study the marketing and distributing of American farm products. In cooperation with the Bureau of Plant Industry, an investigation of European seed markets has been under way since the first of the year, and in cooperation with the Bureau of Animal Industry, an extensive survey of the livestock, meat, and dairy situation in Europe is now in progress.

Until the Bureau of Markets assumed the task of investigating foreign markets for agricultural products the government had done little systematic work looking to the promotion of the farmers' interests in export trade. With rare exceptions were experts sent to study the demands and methods in foreign countries, and such information as was furnished was fragmentary and of a more or less general nature. Yet in 1913, a representative year for instance, the total foreign trade in agricultural products amounted in value to approximately \$1,094,000,000, or 745 per cent of the total exports of the United States.

The producers, in most cases, did not think in terms of foreign trade because as a rule they did not engage directly in exportation, and probably for that reason did not demand government help in finding and developing markets for their products. The war, however, has stimulated widespread interest in foreign trade, and the producers, their organizations, and export mediums have come to assume the initiative in demanding a specialized service. They appear to be awake to the possibilities of holding a fair proportion of the increased trade and of utilizing fully any proper advantages which may be offered by the American merchant marine in developing new markets.

In preparing to meet the demands for a specialized service on agricultural foreign markets the Bureau has endeavored to avoid any possibility of duplication. With this idea in view the work has been developed in close advisement with officials of the Bureau of Foreign and Domestic Commerce of the Department of Commerce and the Consular Service of the Department of State; and arrangements have been made looking to close articulation with those departments and their representatives in foreign countries. As a result, the Bureau of Markets and the Bureau of Foreign and Domestic Commerce are enabled to specialize, the former in agricultural products and the latter in its special field, with appropriate cooperation in connection with agricultural commodities which may be regarded as semi-manufactured.

CHARLES J. BRAND

Chief of Bureau.

CLARENCE W. MOOMAW

Specialist in Charge,
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OUTLINE OF FOREIGN TRADE ACTIVITIES OF THE BUREAU OF MARKETS

The outline which follows is meant to set forth in brief form the general subjects of investigation, the specific activities, and the organization of the work now in progress or to be undertaken as soon as conditions allow. All of the activities are regarded as highly important, but sufficient funds and facilities will not be available to proceed with all of the work simultaneously or in the immediate future. The activities will be undertaken, therefore, in the order of their importance as funds become available.

GENERAL SUBJECTS OF INVESTIGATIONS

1. The supply of agricultural products in foreign markets and the export surplus in the principal foreign countries with which the United States competes.
2. The consumption and consumptive demands in the principal importing countries.
3. The market preference as to kinds of products and the requirements as to grading, packing, and branding.
4. The channels of trade through which the products pass and the business practices involved.
5. The methods and costs of marketing both American and foreign products.
6. Methods of financing export trade in agricultural products.
7. The export forwarding, storage, transportation, and insuring of agricultural products.
8. The economic conditions influencing the marketing of American agricultural products in foreign countries.
9. Trade opportunities for American agricultural products.

SPECIFIC ACTIVITIES

1. Grain and Grain Products

- a. Continuation of investigations of the physical condition of grain in transit to overseas countries for the purpose of inducing improved stowage methods and thereby reducing the extensive loss and dissatisfaction caused by the old methods.

b. Continuation of efforts to inform fully the grain importers of foreign countries as to the benefits and advantages which they may derive from the administration of the United States Grain Standards Act. The importance of this point will be appreciated when it is understood that before the war the majority of European importers would not buy American grain when they could buy elsewhere. The administration of the Act, with which the Bureau of Markets is charged, establishes a new and very satisfactory basis of grade and inspection, and if properly brought to the attention of foreign buyers it will serve to secure for the American grain industry a far better position in foreign trade.

c. An investigation of the marketing of American grain and grain products in European countries as to the competition encountered, the trade practices involved, the respects in which the American trade can be improved, and the possibilities of developing markets in Europe and elsewhere for grain products and by-products.

d. An investigation of foreign markets for American seeds. The importance of this work is greatly enhanced on account of the Russian situation, that country being a large exporter of seeds in normal times. Seed marketing experts were sent to Europe early in January for the purpose of studying the demands and methods of marketing.

2. Cotton and Cottonseed Products

a. Continuation of investigations and activities looking to the universal adoption of uniform cotton standards.

b. Periodical investigations and reports on the world's supply, consumption, and consumptive demands of cotton.

c. Continuation of work looking to the development of foreign markets for American-grown Egyptian cotton, the production of which is rapidly increasing in the Southwest.

d. An investigation of the business methods of European cotton merchants and their exchanges, encouraging wherever possible direct trade relations in purchase, arbitration, and exchange.

e. A study of foreign markets for cottonseed products as to the supply, demand, and possibility of developing the markets for the refined products, including a study of trade practices and methods.

3. Livestock and Meats.

a. Continuation of the survey of the livestock situation in Europe as to the supply and possible demands upon America during the readjustment period, giving assistance to American breeders and exporters in supplying the demands. Two experts, representing the Bureau of Markets and the Bureau of Animal Industry, were sent to Europe early in February for an extensive investigation of the livestock, meat and dairy situation.

b. The dissemination among European importers and breeders of information relative to the American Live Stock industry as to sources of supply of the various breeds, and other information which may be of help to them in making purchases in America. Information is now being assembled for this purpose.

c. The accumulation and dissemination of information relative to world trade in livestock and the position of the American industry in the trade.

d. A survey of the extent to which Europe may require importation of meat and meat products during the next few years until the European herds may be increased to normal.

e. Periodical surveys of the meat supply and market situation throughout the world, with particular reference to the conditions in Australia and the Argentine which are large sources of supply.

4. Dairy and Poultry Products

a. A study of the possible extent of European demands for dairy products during the period of readjustment. Now in progress in connection with livestock and meat investigations.

b. An investigation of the methods under which American dairy and poultry products are exported and marketed in the foreign countries, with particular reference to the medium through which the products are handled.

c. Periodical surveys of the conditions in the world's trade in dairy products.

d. A study of the possibilities of developing foreign markets for American dairy and poultry products and the best methods of procedure to be followed by American producers and exporters.

5. Fruits, Vegetables, Nuts, and Honey

a. Continuation of investigations of foreign markets for fresh and dried fruit, with assistance to fruit shippers in reconstructing the former substantial trade with Europe and in developing export outlets in other directions. Bulletins to be issued in the near future giving results of fruit market investigations recently completed in the Far East and Australasia.

b. Continuation of investigations and experiments in the physical handling of fresh fruits and vegetables in transit to overseas countries, looking to improvement in methods of stowage and reduction of the extensive loss incurred from deterioration on the steamers.

c. A study of the possibilities of expanding the foreign trade of the United States in vegetables, both fresh and dried, including potatoes.

d. An investigation, in close cooperation with the Bureau of Foreign and Domestic Commerce, of the export trade in canned fruits and vegetables and vegetable oils, as to the possibilities of developing the export outlet, the methods of marketing and the demands of foreign countries.

e. An informational service on foreign markets for nuts and honey.

6. Tobacco

The accumulation of information as to the stocks and consumption of leaf tobacco in foreign countries, and as to the condition of the markets for the several classes, with studies of marketing and distributing methods.

7. The Export Forwarding and Transportation of
Agricultural Products, and Marine Insurance

a. An investigation of the methods of forwarding agricultural products to overseas countries as to the steps which must be taken by the shippers in securing space and arranging for shipments.

b. The methods of steamships in loading and discharging cargoes and in adjudicating and settling claims for damage.

c. Collection and information as to ocean freight rates on the various agricultural products both from the United States and from foreign countries to the principal foreign markets.

d. A study of marine insurance for agricultural products as to the extent of risks assumed, the rates charged, and the possibility of securing insurance to cover risks heretofore not covered.

8. Assistance to Producers and Exporters in
Developing Foreign Markets

a. The organization and dissemination of useful information among producers, their organizations, and exporters, relative to foreign markets, trade opportunities, trade mediums, methods of marketing, and the other subjects investigated.

b. The encouragement of special production and approved methods of grading, packing and branding to meet peculiar foreign demands.

c. The encouragement of foreign marketing organizations among the producers under the provisions of Section 6 of the Clayton Act, with assistance to the producers in forming such associations.

d. The encouragement of foreign marketing organizations among exporters of agricultural products under the provisions of the Webb-Pomerene Act, with assistance to exporters in forming such associations.

ORGANIZATION AND FACILITIES FOR
CARRYING ON THE WORK

1. In the United States

a. Foreign trade specialist in charge of division, with headquarters at Washington.

b. Investigators for work among exporters, forwarding agents, steamship operators, port corporations, to secure the large amount of information which is available among these firms relative to the foreign marketing of agricultural products and to assist in the improvement of methods and in the solution of export problems.

c. Research, statistical and editorial assistants, including translators, for assembling from foreign publications information for use in answering inquiries and preparing publications relative to foreign markets and world trade in agricultural products.

d. A publication, to be developed as soon as practicable, as a means of disseminating useful information relative to foreign markets and promoting the interests of American agriculture in world trade.

e. The assistance of the Bureau's organization as a whole, with the extensive staffs of commodity experts, branch offices, and market reports in the various lines.

2. For Foreign Countries

a. Several Agricultural Trade Commissioners, as permanent representatives in Europe, with assignment to definite posts and territories, providing them with ample facilities for the performance of their duties.

b. Special investigators, to be sent out from time to time as in the past, to make investigations in specific lines as the needs of the producers and exporters may require.

c. Cooperative assistance of the American Consular Service and the Bureau of Foreign and Domestic Commerce.

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LISTS OF FOREIGN LIVESTOCK BREEDERS AND IMPORTERS
MAY BE SECURED FROM THE BUREAU OF MARKETS

During the past year, in cooperation with the Consular Service of the Department of State, the Bureau of Markets has assembled extensive lists of livestock breeders, importers, and associations of breeders in European countries, in order to supply the demand of American breeders and importers for such information. There have been completed and mimeo-

graphed for circulation, lists for the following countries:

United Kingdom	Spain
France	Holland
Italy	Denmark
Switzerland	Algeria

Copies of these lists may be secured upon application to the Bureau's Division of Foreign Marketing Investigations.

REGULATIONS AFFECTING EXPORT TRADE IN AGRICULTURAL PRODUCTS

The War Trade Board up to March 6, 1919, had removed from the Export Conservation List all agricultural products except wheat (not including seed wheat), wheat flour, and red-clover seed.

However, all shipments for export still must be covered by export licenses. Trade with some countries requires an individual license issued to the shipper by the War Trade Board, while to other countries shipments may be forwarded under a general license lodged by the War Trade Board with the Customs Service.

It is not necessary to make application to the War Trade Board for permission to export to the United Kingdom, France, Italy, Japan, Belgium, or Greece, their colonies, possessions, or protectorates; and no special document issued by the Board is required in connection with such shipments. The War Trade Board has granted to the Customs Service Special Export License R.A.C. 63, authorizing the Customs Service to permit exports to the above-named countries, without requiring individual licenses, for the following commodities:

(a) All shipments of commodities not on the Export Conservation List.

(b) Shipment of commodities on the Export Conservation List where the value of no one commodity exceeds \$200.

The procedure to be followed in exporting to the above-named countries is as follows:

(1) In order to export any commodity not on the Export Conservation List, or any commodity on the Export Conservation List valued at \$200 or less, no individual license is required; and shipments may be made under Export License R.A.C. 63 by presentation of Shipper's Export Declaration (Custom Cat. 7525) in quadruplicate to the Collector of Customs at the port of exit from the United States.

(2) To export any commodity on the Export Conservation List of a value exceeding \$200 application must be made on W.T.B. form X or form X-A and any supplementary information sheet used therewith as the regulations of the War Trade Board may require in connection with shipments of certain commodities.

Allied countries continue to remove their restrictions on importations. The removal of import restrictions by the French Government

covers a wide range of articles and indicates rapid progress to a return of normal trade conditions.

The possibilities of trade with neutral nations has been enlarged greatly since the signing of the armistice. Individual licenses are still required for all exports to Denmark, Norway, Sweden, Finland, Holland, Switzerland, and Greece. The War Trade Board publishes from time to time a "Free List" of commodities for which licenses will be granted readily upon application. Many changes have been made in import restrictions and trading requirements by the neutral governments.

Individual licenses will be considered by the War Trade Board also for exports to the following ports, territories, and countries with which trade has been resumed since the signing of the armistice:

Siberia, Alsace, Lorraine, Syria, Palestine, Rumania, Serbia, Mesopotamia, Finland, Turkey, Bulgaria, Grand Duchy of Luxemburg, German colonies, occupied territory of Germany, and all Black Sea ports.

Exporters of agricultural products should be careful to make the necessary freight arrangements before moving exports to the seaboard and to acquaint themselves with the import regulations of the countries of destination. The Bureau of Markets is prepared to give information upon these subjects.

ALLIED PROVISIONS EXPORT COMMISSION DISSOLVED

The War Trade Board announced, under date of March 6, that the Allied Provision Export Commission had been dissolved and that purchases of foodstuffs for shipment to Great Britain, France, and Italy no longer would be made through that commission.

The Wheat Export Company, of New York City, has informed the Bureau of Markets that it will continue to represent the Allies for the purchase of all grain and cereal products and that the Allied Governments will continue to buy wheat, wheat flour, and oats solely through that agency. Trading in corn, rye, barley, and other coarse grains and their products may now be carried on by private individuals; but, owing to the difficulties of freight and finance, the Allied Governments may continue to purchase some of these cereals as occasion demands.

The Bureau also has been informed by the British Ministry of Food that with the exception of wheat, wheat flour, and oats, Government purchases have been suspended and will not be resumed unless conditions change. The trade in all food products with the United Kingdom, except in the articles named, has been released to private commerce. The British list of restricted imports is the only barrier to open trading. However, this list undergoes frequent changes, ham, bacon, and lard having been removed therefrom within the past few days. Exporters should ascertain that a British import license has been issued before making definite and unconditional commitments of export sales of articles which may appear on the list.

With but few exceptions, France has removed import restrictions from all products of agriculture. The French Government will continue to buy wheat, wheat flour, and oats through the Wheat Export Company of New York City. No license to import is now required of French consignees.

The Italian Government continues to purchase and control practically all the principal food supplies, and the matter of sales to Italy may be taken up with the High Commission for Italy at Washington, D. C. For all articles not purchased by the Italian Government an import license is required.

AGRICULTURAL PRODUCTS ON BRITISH LIST OF RESTRICTED IMPORTS

There are given below, as in effect under date of March 1, 1919, the principal articles of agriculture which are prohibited from importation into the United Kingdom except under license.

List "A" includes articles that may be imported under license.

List "D" gives those commodities for which a general license will be continued until July 1, 1919.

List "C" includes articles for which a general license for an indefinite period has been issued.

List A

Bladders, casings and sausage skins.	Molasses and invert sugar and all other sugars and extracts from sugar which cannot be completely tested by the polariscope, and on which customs duty is not otherwise charged.
Bulbs.	Oleo stearine and tallow.
Butter.	Olive oil.
Cheese.	Onions.
Cocoa, preparations of.	Soy beans.
Cocoa, raw.	Sugar, articles and preparations containing, used for food (except condensed milk).
Coffee.	Sugar cane.
Fibre flaxseed for sowing.	Sugar.
Flowers, fresh.	Tobacco, unmanufactured and manufactured, including cigars and cigarettes.
Fruit (canned, bottled, dried and preserved, except currants).	Tomatoes.
Fruit, raw of all descriptions (except lemons and bitter oranges) and almonds and nuts used as fruit	Vegetables, canned, bottled, dried and preserved and pickled.
Hides, wet and dry.	Vegetables in brine.
Hops.	
Horns and hocks	
Jute, raw.	

List B

Almonds.	Goat and sheep skins, tanned.
Apples.	Hides, wet and dry.
Bananas.	Horns and hoofs.
Bladders.	Nuts.
Casings and sausage skins.	Onions.
Cocoa, raw.	Sheep and lamb skins dressed.
Coffee.	Sugar cane.
Fruit from all sources, canned, bottled, or preserved.	Tobacco, unmanufactured and manufac- tured, including cigars and cigarettes.

List C

Flowers, fresh.	Raw hides of all descriptions and weights.
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NOTE.- All conversions of foreign money into U. S. money in these reports are at the normal rate of exchange.

PROSPECTS FOR PEANUTS IN INDIA

It has been estimated officially that there will be 1,147,000 acres in peanuts in India in 1918-19 as against 1,771,000 acres last year, a decrease of 35 per cent.

The following estimates show the acreage in peanuts for previous years in the Provinces of Madras, Burma, and Bombay, which comprise 99 per cent of the peanut area of India.

Peanut Acreage in India, 1917 and 1918

Province.	Acreage.		Average yield per	
	1916-17	1917-18	1916-17	1917-18
Madras.....	1,793,000	1,412,000	1,031	1,122
Burma.....	265,000	248,000	938	921
Bombay (including Native States)...	276,000	254,000	2,110	2,230
Total or average ..	2,334,000	1,894,000	1,148	1,233

The area in peanuts in Bombay yielded 260,000 tons in 1916-17 and 293,000 tons in 1917-18. According to the Bombay Government Gazette, 51,620 tons of peanuts were exported in 1916 and 81,713 tons in 1917.

On the foregoing basis in 1917, the exports of peanuts from Bombay were 28 per cent of the yield, which showed an increase per acre of 9 per cent. If, therefore, the decrease in acreage in Bombay in 1918-19 is proportionate to the decrease in the entire country, 35 per cent, and the per acre yield is not materially increased, very few peanuts will be exported, provided the consumption in India remains normal.

During the war practically all trade with Europe ceased, but with the resumption of shipping any surplus of peanuts for export probably will be sent to European countries.

The War Trade Board has announced that individual licenses to import peanuts will now be issued. This ruling removes the restrictions on peanuts shipped from the country of origin or from the primary overseas market, but it does not apply to peanuts now stored in Canada, unless such shipments were bought and paid for prior to April 14, 1918, the date of the original restriction.

MARKET FOR OILCAKE AND CORN

There is a demand for cottonseed oilcake and corn in Denmark with very little offered from America. Since July 1, 1918, there have been no exports of oilcake to Denmark from this country and only 20,397 barrels of corn meal, in January, 1919.

AMERICAN BACON IN NORWAY

Bacon from the United States is being imported into Norway in constantly increasing quantities as the transportation facilities improve. The Ministry of Food has fixed the following maximum retail prices for American bacon: Boned, \$0.502 per pound; shoulder, \$0.45; bacon for carding, \$0.41; smoked bacon, \$0.0134 additional.

FORAGE SITUATION IN FRENCH MARKETS

During the past winter the supplies of forage in French markets have been very limited, owing to the condition of the roads interfering with cartage. As an indication of the scarcity of forage during the past

winter in market centers of France, the following quotations at Chapelle, December 24, 1918, and at Paris, January 30, 1919, are given:

Commodity.	: Price per ton of 2,240 pounds.	
	: Chapelle.	: Paris.
Lucern.	\$101-109	\$101-105
Meadow grass, second crop	101-105	...
Hay	100-103	90- 98
Wheat straw	22- 28	18- 22
Oat straw	30- 34	20- 22
Rye straw	30- 34	22- 24

The supply has increased slightly during the late winter, with a consequent drop in prices. The majority of domestic consignments consisted of wheat straw.

PARIS PREFERS YELLOW POTATOES.

The yellow potato is preferred to the white varieties by the Paris consumer, but the supply was recently reported to be insufficient, owing to a lack of transportation facilities. The exports of potatoes from the United States to France are negligible, only 400 bushels having been shipped in 1918.

GRAIN EXPORTS INCREASE IN VOLUME.

According to a report of the Director General of Railroads, regarding the export freight situation on March 10, there were 20,136,000 bushels of grain in the elevators at the North Atlantic ports; 5,049,000 bushels were received during the week; while 3,772,000 bushels were cleared. A strong movement in grain overseas is anticipated.

WHEAT SUPPLY OF SWITZERLAND

Switzerland imports most of its wheat supply. Swiss farmers consider livestock raising and dairying their staple industries, and they grow wheat for the sole purpose of supplying sufficient flour and straw

for their own needs. The following table showing the quantity and value of the imports of wheat into Switzerland for the prewar years 1910 to 1915, will indicate the importance of the normal trade.

Imports of wheat into Switzerland, 1910-1915

Year	Quantity : (bushels) :	Value	
		Total.	: Per bushel.
1910 . . .	: 14,650,553 :	\$12,677,139 :	\$1.27
1911 . . .	: 16,108,440 :	21,256,055 :	1.32
1912 . . .	: 17,305,410 :	23,286,022 :	1.31
1915 . . .	: 17,679,496 :	33,985,563 :	1.92

As shown by a comparison with the data given in the following table, the war's obstruction to production and shipping affected Switzerland to a very great extent, so that in a larger measure than ever the nation had to depend upon imports from the United States. In 1917 more than one-third of the grain was imported from this country, and in 1918 nearly one-half.

Total imports of wheat and wheat flour into Switzerland for the first nine months of 1917 and 1918, showing proportion from the United States

Jan.-:		Wheat.		:	Wheat flour.	
Sept.:	Total quan-	Imported	Percentage	Total quan-	Imported	Percentage
:	tity imported:	from U.S.:	from U.S.:	tity imported:	from U.S.:	from U.S.:
:	Bushels.	Bushels.	:	Pounds.	Pounds.	:
1917 :	8,625,441 :	3,404,450 :	39 :	11,709,500 :	..... :	.....
1918 :	954,466 :	395,967 :	42 :	134,971,060 :	98,166,208 :	73

With Switzerland's usual sources of supply cut off during the period of the war, the quantities of wheat available for import into Switzerland became so low and the prices so high that the Federal Council took measures to increase the acreage. In prewar years the average area sown was 292,500 acres, which produced sufficient wheat to last the nation only two months. In 1917 the Council ordered the additional sowing of 125,000 acres, and guaranteed a minimum price of \$3.16 a bushel for the 1918-1920 harvests and \$2.63 for 1920-21 yield. It also was stipulated that should the price of controlled wheat exceed the guaranteed minimum at any time during the next four years (1918-1921), the sellers would be entitled to the higher rate. The average price of wheat up to 1914 was \$1.31 per bushel as against \$4.20 in 1918.

DAMAGE TO BRAZILIAN FOODSTUFFS BY LOCUSTS

Locusts have caused considerable damage to beans, rice, and corn throughout the State of Sao Paulo, Brazil. The yield of corn is so reduced that all export of that commodity from Santos has been prohibited by the Federal Food Controller. A considerable export trade in corn and corn products ordinarily is carried on by Sao Paulo. In 1917 there passed through the port of Santos 197,288 bushels of corn and 3,044,25 pounds of corn meal, having a total value of \$304,202.

INCREASE OF COTTON IMPORTS REQUIRED BY SAO PAULO, BRAZIL

It is estimated that the 1919 supply of cotton in the State of Sao Paulo, Brazil, will be so greatly reduced, owing to damage by locusts, that much larger quantities will have to be imported this year than heretofore. All the cotton grown in Sao Paulo is used by the local mills. In 1912-13, the year of highest production, the domestic supply of ginned cotton amounted to approximately 53,750 bales (American weight). In addition to this there were imported from Pernambuco the equivalent of 60,500 bales in 1912, and 43,360 bales in 1913, valued at \$2,611,917 and \$2,243,946 respectively.

GUARANTEED PRICE FOR AUSTRALIAN WHEAT

According to a cablegram received by the Department of Commerce on March 21 from the American Trade Commissioner at Melbourne, Australia, the Government of Australia has guaranteed a price for 1920 wheat of 4 shillings (\$0.972) per bushel.

AUSTRALIA PERMITS IMPORTATION OF LEMONS

The War Trade Board has announced that the importation of lemons is now permitted by the customs authorities of Australia to the extent of 10 per cent of the average quantity imported yearly by each importer during the three years ending June 30, 1913, or, at the option of the importer, to the extent of 10 per cent of the quantity imported by the importer during the year ending June 30, 1913. Under this ruling importations must be made prior to June 1, 1919.

PROSPECT OF REDUCED AGRICULTURAL EXPORTS FROM ALGERIA, 1919

In normal years Algeria produces a considerable surplus of grain, which usually is exported to France and other European countries. However, owing to excessive rains during the past fall and winter, agricultural operations have been delayed, thus decreasing the grain acreage sown. The yield of last year was considered exceptional in quantity and quality but with the present adverse conditions it is estimated that the 1919 yield will fall far short of that of former years, thus curtailing the exports of grain to Europe. The following table shows the relation which exports bore to the supply in 1917.

Relation of exports to supply of grain in Algeria

Grain	:	Yield (1917).	:	Exports (1917).
	:	Bushels.	:	Bushels.
Barley	:	31,365,000	:	2,322,223
Corn	:	301,670	:	25,194
Oats	:	12,562,500	:	3,060,124
Wheat	:	23,899,000	:	2,057,693

The continued rains also have damaged vegetables, early fruits, and vines, the exportable surplus of which is usually sent to France and Northern Europe.

LIVESTOCK EXPOSITION AT SAO PAULO, BRAZIL

The State Department received the following cablegram under date of March 6, from the American Consul at Sao Paulo, Brazil.

"Important livestock exposition opens here April 21. . . Breeders and manufacturers all lines connected with stock raising should send by ordinary mail, not parcels post, catalogs to consulate for distribution."

GROWING DEMAND FOR BETTER LIVESTOCK IN BRAZIL

Interest in the livestock and frozen-meat industries has increased greatly in Brazil during the war, according to a recent article in the London Board of Trade Journal. Both Brazilian and American interests

have grasped the fact that Brazil as a stock-raising country has attractive possibilities.

Five meat-freezing concerns are already doing business and four more are building plants. These nine companies will be able to slaughter 5,000 cattle daily, as well as a number of hogs and sheep. A plant with a capacity of 3,000 hogs daily is also being constructed.

The capital invested in these companies, which is nearly all from the United States, amounts to \$10,000,000.

Most of the cattle in Brazil are crosses of the Indian zebu with the Portuguese stock imported years ago. The general type is large-boned and coarse, but hardy. However, the quality of the meat is poor, and it is carried in the forequarters instead of the hindquarters. The export has been chiefly to Italy, where a lean meat is demanded. In order to meet the needs of other countries, the Brazilian producers realize that the stock must be graded up, so that the quality of the meat may compare favorably with that exported from Argentina and Uruguay. This is now being done to some extent by importing pedigree stock from the United States, Argentina, Uruguay, and England. The Government of Brazil recognizes the importance of obtaining pure-bred stock, and is encouraging importation by allowing free entry and by offering all possible inducements. The following breeds thrive in Brazil: Hereford, Devon, Polled Angus, Shorthorn, Holstein, Jersey, Lincoln Red, Flamengo, Normande, Limousine, Simmenthal, and Switz.

As an indication of the possible extent of the demand for breeding stock, the Journal points out that an examination of statistics of the world's supply of cattle shows that Brazil stands fourth, with more than 23,000,000 head, consisting mostly of the low-grade crosses. In order to grade up the stock properly, it is believed that extensive imports may have to take place from the United States and other countries having the most desirable breeds.

A rough estimate of the numbers of livestock in Brazil is given in the following table, which also gives a comparison of the number of animals to the square mile in Brazil and Argentina:

Estimate of livestock in Brazil and comparison of numbers
of animals per square mile in Brazil and Argentina

Animal	Number	Number per square mile.	
		Brazil	Argentina
Cattle.....	28,962,180	3.83	25.20
Sheep.....	7,204,902	2.20	72.10
Hogs.....	17,329,210	5.29	2.50
Goats.....	6,919,550	2.12	3.46
Horses.....	6,065,230	1.83	8.20
Mules and donkeys	3,221,910	1.98	1.65
Total.....	69,702,982	22.25	113.11

From these data it is apparent that a large increase in livestock could be supported, provided the facilities are adequate for transporting the stock to market centers. The principal stock raising states are Bahia, Goyaz, Mato Grosso, Minas Gerais, São Paulo, and Rio de Janeiro. Sul.

Next in importance to cattle, hogs are remarkably well adapted to the consumption of pork is very great. There are some large hogs of large size but they are narrow. The hogs are raised in all parts of Brazil.

Sheep have had very little attention up to the present time for supplying meat, the existing stock having been bred for wool and hides. Merinos have been imported from the United States and other countries. Other classes which thrive are Romney Marsh, Lincoln, and all Down breeds.

The demand for pure-bred stock is increasing rapidly and an English livestock expert, attached to the British Consulate in Rio de Janeiro has suggested that a show farm of English breeds should be maintained in Brazil with a view to directing the trade to England.

- He suggests that the stock raisers would be able to obtain the various breeds, discuss their fitness for a particular region, and receive practical instruction in management. The stock at the show farm could be purchased or orders could be sent direct to the breeder, thus avoiding the importation of inferior stock.

It is reported that American interests already have purchased large tracts of land in Brazil and have started livestock raising on a large scale. The success of these stockyards has already attracted the United States as the most readily available market in which to purchase pure-bred stock.

LIVESTOCK SITUATION IN SWEDEN

In a special report to the State Department for the Bureau of Markets the American Consul General at Stockholm, Sweden, under date of January 16, 1919, gave the following statistics relative to the number of livestock in Sweden and the exterior trade in livestock for a period of years:

Livestock census, June, 1914, to September, 1918, inclusive

Animal	1914	1915	1916	1917	1918
Cattle....	3,063,129	2,383,784	2,913,150	4,000,331	4,000,331
Sheep....	1,205,245	1,146,328	1,139,469	1,349,802	1,349,802
Hogs.....	1,023,458	891,100	1,083,330	1,049,867	1,049,867

Exterior trade in livestock

	Exports.			Imports.		
Animal.	1916	1917	1918*	1916	1917	1918*
Cattle.....	27,196	2,658	5	54	0	9
Sheep.....	6	3	1	60	3	1
Hogs.....	166	3,201	360	216	0	0

* The statistics for 1918 are for the first 11 months only.

With reference to the number of livestock in Sweden it will be noted that the statistics show a decrease as between June, 1914, and June, 1918, in cattle and hogs, but an increase in sheep. During the period cattle decreased 486,016 head, or 16 per cent, and hogs, 379,787 head, or 37 per cent, while, on the other hand, sheep increased 103,716 head, or approximately 7 per cent. A census of hogs on September 1, 1918, showed an increase to 852,027 as compared with 633,571 in June of that year.

It is notable that the number of livestock of the classes named was well maintained up to June, 1917. The lack of foodstuffs and the shortage of food during the winter of 1917-18 had a marked effect on cattle and hogs. Statistics are not available which would indicate the present conditions.

As to the exterior trade during the past three years, it will be noted that the exports of cattle, which amounted to 27,196 head in 1916, practically ceased by 1918. Exports in other lines are not of interest. Imports were only negligible.

The Consul General reported that the current average market prices for livestock in Sweden were as follows:

Cows \$0.74 per kilo (2.2046 pounds); calves, \$0.60 per kilo; oxen, \$0.82; sheep, \$0.96; and hogs, \$0.86.

CONTINUANCE OF WOOL CONTROL IN GREAT BRITAIN

The State Department received from the American Consul General at London, under date of January 31, the following report on the wool situation in Great Britain.

A meeting of the British Wool Council was held last week, under the Chairmanship of the Director of Raw Materials and considered the continuance of the wool control for some time longer. The Chairman stated that the dangers of short supply were definitely over, that he estimated that 40,000 tons per month for a period of six months would be available for France, Belgium, and Italy from the British Empire. During the second half year of

the present year he estimated that something below 35,000 tons monthly to England would prove to be sufficient. With respect to the relaxation of control the following statement was made:

"We share the opinion of the Labor members that speculation in the raw material should be discouraged, and that prices should be established as much as possible. The Government of Australia and New Zealand have clearly indicated that they wish their wool clips to be handled in such manner as to produce, so far as possible, those results. We think we see our way to do this without prolonging for more than a few weeks any of the existing measures of Control, and to limit ourselves for the future to the careful marketing of Australian and New Zealand wool owned by the Government. It is our intention early in April to commence selling Australian wool by auction and to continue to sell by that method as large a quantity as the market requires and as the brokers are able to handle. We shall put reserve prices on our wool at these auctions somewhat lower than the present Bradford issue prices. It is not expected that more than 80,000 bales can be handled in the April auctions, and though larger quantities will be dealt with in the following months there appears to be no hope of handling efficiently anything like the quantity of wool which will be required month by month if France, Belgium, and Italy are to draw largely upon London for their supplies. We propose, therefore, so long as may be necessary to continue to issue wool outside the auctions at fixed prices. Throughout April at least those prices will be the same as those at which wool is now issued. No doubt as time goes on alterations will have to be made, both as regards the general level of prices and the proportionate values of the different grades. The influx into the markets of free wool from a variety of sources, and the results of the Government auctions will in due time give a clear indication as to the lines on which the Bradford issue prices should be revised, but it is not our intention to make any changes until we have a clear and well-marked basis for so doing, and we shall thereafter endeavor to avoid having frequent changes. It will be clear to the Council that both British and Allied consumers will therefore have three alternative sources of supply:

- (1) Purchases at Government auctions.
- (2) Purchases at the Government fixed issue prices.
- (3) Purchases of free wool from all sources of supply except Australia and New Zealand at prices fixed by unrestricted bargaining."

The Chairman further stated that to prevent excessive competition at auction sales it had been decided by the Government that wool would be available at any time at fixed prices which would constitute a maximum. Finally, it would be in the hands of the Government to keep the market well supplied without ever allowing it to be over supplied. As to British wool, it was stated that the arrangements would be such as to allow the 1919 clip to be sold at not less than 60 per cent over the 1914 prices.

As to South American wool, it was stated that the opposition of the Treasury to the unrestricted importation of such wool had not been withdrawn. It might, therefore, be some time longer before River Plate competition was brought to bear directly upon this market, but the Council would appreciate that France, Belgium, and Italy would be in a position to draw such supplies as they chose from South America, and therefore the effect of any fall in prices would soon react on this market. The Chairman, however, regretted very much the loss of valuable British trading connections which the long interruption of importations from South America implied.

RECORD WOOL CLIP IN SANTA VICTORIA, BRAZIL

An extraordinarily large wool clip, estimated to be about 16,000,000 pounds, has been reported from the State of Santa Victoria, Brazil.

PURCHASE OF SOUTH AFRICAN WOOL

Under date of December 23, 1913, the Department of State received a communication from the American Consul at Port Elizabeth, South Africa, stating that the British Government, in order to place South Africa in an equally favorable position as the other dominions, offered to purchase a portion of the 1918-19 wool clip at an increase of 55 per cent over the average of the 1913-14 prices, provided that at least 100,000 bales were offered. The Consul reports that, according to the latest information, less than 100,000 bales had been pledged.

CANADIAN FOOD SITUATION

Report of American Consul at Kingston, Canada, January 20, 1919

According to a report issued by the Canadian Government concerning stocks in storage on January 1, 1919, there were 11,355,271 pounds of creamery butter on hand, an increase of 7 per cent over last year's holdings, though it is about 4,750,000 pounds less than a month ago.

Oleomargarine stocks were 761,182 pounds. This is a slight decline from last month. No figures were available for a year ago.

Cheese stocks have declined from last month, and were 4,430,303 pounds, a decrease of 67 per cent as compared with a year ago.

There were 2,075,716 dozen eggs in cold storage, which is less than half those on hand December 1; 395,113 dozen on hand other than in cold storage, which is about one-half of the stocks of a month ago; and 1,935,295 pounds of frozen eggs, compared with over 2,500,000 pounds a month ago. Comparative data show that there were 3.05 per cent fewer eggs on hand than a year ago.

The stock of pork amounted to 38,291,329 pounds (including 15,008,897 pounds still in process of cure), 12,762,447 pounds of sweet-pickled, 3,343,355 pounds of dry salted, 2,479,060 pounds of frozen pork, and 2,479,570 pounds of fresh unfrozen. Comparative data indicated this to be 3.2 per cent more than a year ago.

The stocks of beef amounted to 57,166,998 pounds, including 51,109,590 pounds of frozen beef, 4,607,227 pounds of unfrozen fresh beef, 549,518 pounds of cured, and 900,663 pounds of beef in the process of cure. This is 20.52 per cent greater than a year ago.

The stocks of mutton and lamb included 8,783,967 pounds of frozen and 179,936 pounds not frozen, about 78 per cent more than a year ago.

The stocks of chickens were 3,172,869 pounds, and other poultry 2,565,981 pounds, about 115 per cent more than a year ago.

The stocks of fish were 22,460,883 pounds, a drop of about 500,000 pounds from last month, but about 39 per cent more than a year ago.

FOOD SITUATION IN GERMANY AND AUSTRIA

A shortage of vegetables is beginning to make itself felt in Breslau. Young turnip tops, radishes, and salad cannot be bought, and cauliflower, red cabbage, and savoy are obtainable only in small quantities. The prevailing prices for vegetables per pound are as follows: Brussels sprouts \$0.30; white cabbage \$0.035 to 0.05; spinach \$0.12; kale \$0.095 to 0.12; carrots \$0.04 to 0.05; small Teltow turnips \$0.19.

The milk supply of Dusseldorf and other western industrial cities on the right bank of the Rhine has been curtailed considerably by the occupation of the left bank by the allied forces and the consequent cutting off of all communication across the river. The slaughter of milch cows has also decreased the supply.

Regulations recently issued for the cultivation of sugar beets for the year 1919-20 include the continuation of the enforcement of compulsory cultivation. Beet-sugar factories can obtain sugar beets from the same sources and from an area of the same size as in 1916. Contract conditions generally will remain the same as in that year, but the minimum price to be fixed shortly for 1919-20 will govern all agreements. The restrictions on the use of beet roots in distilleries will be suspended for 1919-20.

According to a report from Germany, the sugar-beet area has decreased from 1,406,000 acres in 1914-15, the first year of the war to 882,000 acres under cultivation at present (1917-19). On the other hand the cost of sugar beets has risen from \$0.326 per cwt. in 1916 to double that price, \$0.65 per cwt., in January, 1918, and beet sugar from \$3.26 to \$5.93 per cwt., and increase of 81 per cent during the same period.

As an example of the food conditions in Austria, the following comparison as between October, 1918, and October, 1913, of the prewar supply and that in 1918 at the Lainz institution, Vienna, for the care of the aged, will be of interest:

October, 1913 (4,699 persons) . . .		October, 1918 (3,435 persons) . . .	
Meat, all kinds . . .	Kilos: 25,563	Bad beef . . .	Kilos: 10,956
White bread . . .	do : 15,616	White bread . . .	do : 489
Flour and rice . . .	do : 13,395	Flour and rice . . .	do : 6,160
Butter and fat . . .	do : 8,130	Fat . . .	do : 3,057
Eggs . . .	do : 58,500	Eggs . . .	do : 13,700
Milk . . .	do : 92,770	Bad Milk . . .	do : 24,562
Cabbage . . .	do : 4,450	Cabbage . . .	do : 60,800

1 kilo = 2.2046 pounds; 1 liter = 1.05663 quarts.

The Austrian Food Bureau established the following maximum retail prices in Vienna for beef, beginning on January 1:

Maximum retail prices for beef in Vienna

Cut	Price per pound to firms entitled to buy-	
	First-class beef.	Standard beef.
Forequarter (including not more than 15 per cent makeweight . . .	\$1.84	\$0.76
Hindquarter (including not more than 20 per cent makeweight . . .	2.03	.92
Roasts (loin and rib) with bones left in, but without makeweight . . .	2.58	1.29
Other cuts . . .	1.84	.76

Forequarter and hindquarter cuts can not be sold without makeweight; nor roasts with the bones removed. The beef ration is 4.4 pounds.

There is an abundance of sausages in the Vienna markets selling at \$2.58 a pound for ordinary kinds to \$5.99 for ham sausages. It is asserted that these high prices explain the disappearance of offal, which can be sold more profitably in the form of sausage.

FOOD PRICES IN MOSCOW

The Department of State received a cablegram, under date of February 17, from Hon. I. N. Morris, American Minister to Sweden, giving a comparison of the prices of food in Moscow in 1914 and 1919. The information was obtained from persons who had recently arrived at Stockholm from Moscow and is tabulated below.

Comparison of prices of various commodities in Moscow, Russia, for 1914 and 1919^a

Commodity	Unit	1914	1919	Commodity	Unit	1914	1919
Bread:							
Black	..:Pound	\$0.014	\$1.58	Butter	..:Pound	\$0.232	\$ 11.29
White	..:do	.019	..	Millet	..:do	.023	2.86
Flour:				Oil			
Black	..:do	.028	1.69	Salad	..:do	.697	338.56
White	..:do	.037	3.39	Sunflower	..:do	.038	3.95
Meat ^b	..:do	.033	2.82	Sugar	..:do	.051	5.77
Dogflesh	..:do	..	.73	Tea	..:do	.929	14.67
Horseflesh	..:do	..	1.59	Coffee	..:do	.465	..
Potatoes	..:do	.005	.68	Cheese	..:do	.093	8.46
Milk	..:Pint	.074	1.14				

^aThe value of the rouble in 1914 in U. S. money is estimated at \$0.5146; in 1919 at \$0.125. The prices are quoted per Russian pound, which is equal to 0.90232 pound.

^bKind not specified.

OUTLOOK FOR IMPORTS OF POTATOES FROM CANADA

In view of reports that unusually large quantities of potatoes possibly may be imported from Canada during the spring, the Bureau of Markets requested the American Consular Service to secure from Quebec, Prince Edward Island, and New Brunswick information as to the supply of potatoes and the outlook for exports to the United States. The following telegrams have been received from the Consuls at the places and under dates indicated below.

Charlottetown, Prince Edward Island, March 6: Potato stock Prince Edward Island available exports 1,000, 000 bushels. Movement now about over. No probability heavy shipment soon.

Quebec, March 8: Ministry Agriculture advises surplus 20,000-000 bushels potatoes on hand October last. Potato operators advise no potatoes presently offering for export, but farmers known to be holding considerable stocks which can not move until roads open. No export shipments this district during current winter. Quebec relatively small exporter potatoes to United States (ordinarily). New Brunswick and Prince Edward Island large exporters.

Campbellton, New Brunswick, March 13: Regarding potatoes stock. Official estimated production New Brunswick, 1918, 9,077,600 bushels. Increase over 1917, 3,500,000 bushels. Estimated 40 per cent on hand at present. Estimated production Restigouche and Gloucester counties 1,100,000 bushels. Retailed during winter \$3.50 barrel, 180 pounds, now \$3.00, expect further reduction 50 cents. Advised by commission merchants offer \$1.50 barrel carload lots. Few if any exported to the United States from this section (Campbellton). Shipped to Montreal, Toronto, etc. Unable to ascertain whether then exported to the United States.

Imports of New Brunswick potatoes come chiefly from the border counties of Carleton and Victoria. According to investigations of the Bureau of Markets, it is found that the movement into Maine by railway amounted to 264 cars from March 1 to March 18, inclusive. In addition to this, considerable quantities, variously estimated at around 2,000 barrels daily, are coming across the Maine border by sled. The imports by rail amounted to 260 cars in January and 205 cars in February.

OUTLOOK FOR IMPORTATION OF PEANUTS FROM THE ORIENT

A heavy exportation of peanuts to the United States from the Orient during the early part of 1918 caused considerable anxiety among American producers and dealers. The increase was caused by import restrictions and shipping difficulties. In order to show the extent of the trade with the United States, there is given below a comparative statement of imports of peanuts for the fiscal year ending June 30, 1913, and the current year of 1918:

Imports of peanuts (in pounds) from the Orient, 1913 and 1918

Class	Japan	China	Hongkong	India	Total
1913.					
In the shell	8,250,150:	351,170:	65,897:	....	....
Shelled	1,141,869:	455,197:	101,286:	....	....
Total	9,392,019:	806,367:	167,183:	....	10,366,569
1918.					
In the shell	1,092,514:	315,080:	116,526:	....	....
Shelled	48,550,079:	3,476,028:	6,276,400:	8,453,379:	....
Total	49,642,593:	3,792,108:	6,392,926:	8,453,379:	68,281,006

During the past winter the possibility of removing the embargo of April 14, 1918 (see page 13), coupled with rumors in the markets that large quantities of peanuts would be imported, caused considerable alarm in the producing districts. The Bureau of Markets undertook to secure through the Consular Service of the Department of State reports on the conditions in the Far East. According to the reports so far received, conditions do not indicate the possibility of heavy exports to the United States because large stocks are not available. Furthermore, it is reasonable to believe that Europe may be expected again to share in supplies from the Orient.

The American Consul General at Yokohama, Japan, cabled estimates and conditions of January 30, 1919, as follows:

"Written reports have just been received from the American Consuls General at Shanghai, China, and Hongkong. The substance of the reports is given below."

South China produces a large amount of peanuts, but local consumption and crushing leave only a negligible quantity for export. Export stocks come largely from North China. Recent developments in the trade in raw materials would seem to indicate that Japanese merchants may try to control the markets in order to maintain and protect the vegetable oil industry, which underwent a prodigious growth in Japan during the war and may prove difficult to continue successfully under peace conditions. Kobe already is considered the principal market of the Orient for vegetable oils and it may be the purpose of the Japanese to make this market the clearing house also for large quantities of the raw materials, including peanuts, which are used in the production of vegetable oils. The situation and facilities for doing this are apparently at hand. Low rates are made from ports of North China to Kobe on raw materials and rates from Kobe to the United States are much lower than rates from Hongkong to the United States, so that the raw materials and their manufactured products from China, may be handled readily through Kobe in competition with direct shipments from Chinese ports.

A considerable portion of the peanuts exported from Hongkong originate in North China, and some are imported from India for re-export. The total exports from Hongkong to the United States, Canada, and Europe in 1917 amounted to 6,600 short tons. Exports to the United States in

1918 amounted to 3,146 tons. The stocks on hand for export on January 18, 1919, are reported as 666 tons of shelled and 133 tons of unshelled. Prices for standard grades in the export market at Hongkong have advanced as follows: 1916, \$78.75; 1917, \$108.00; 1918, \$162.00; 1919, \$165.00 for shelled and \$129.00 for unshelled (in gold per short ton).

While importation of peanuts for this season may not exceed prewar figures, the growth of the vegetable oil industry throughout the Orient, and the consequent encouragement to the production of raw materials, are factors to be reckoned with in the future by both dealers and producers.

ST. JOHN'S, NEWFOUNDLAND, MARKET REPORT

In a report, dated February 15, giving the prevailing prices at St. John's, Newfoundland, the American Consul includes the following wholesale prices for various agricultural products.

Commodity	Unit	Price	Commodity	Unit	Price
		Dollars			Dollars
Apples, American	: Barrel :	12.50	Oats:		
Bacon	: Pound :	0.27- .37	White	: Bushel :	1.50
Beef, salt	: Barrel :	46.00-47.50	Black	: do :	1.60
Butter, Canadian	: Pound :	.58	Onions	: Bag :	5.75
Butterine	: do :	.35- .40	Oranges, California	: Case :	
Carrots	: Bag :	5.75	Peas:		
Cheese	: Pound :	.38	Round	: Sack :	10.00
Corn	: Sack :	4.80	Split	: do :	9.75
Cornmeal	: do :	4.30	Pork	: Barrel :	47.50-50.00
Eggs	: Dozen :	.80- .90	Potatoes	: do :	4.50- 5.80
Flour, Government	: Barrel :	14.50	Raisins, California	: Box :	7.50
standard	: :				
Ham, American . .	: Pound :	.44	Sugar, granulated	: 100 :	
Hay (2,000 pounds)	: Ton :	55.00		: Pounds :	12.10

